How to Transfer
Stocks, Bonds and Mutual Funds

Donations of DTC Eligible Stocks and Bonds

The fastest and easiest way to make a stock gift to the Passionists is to do an electronic transfer. Your broker will need the following information:

Broker: Charles Schwab and Company, Inc.

DTC Clearing: 0164, Code 40

For Deposit To: The Congregation of the Passion, Holy Cross Province

Account Number: 4422-0451

Typically, securities submitted to DTC for transfer are delivered within 7 business days.

Donations of Mutual Funds

If marketable shares of mutual funds are in the custody of your financial institution and you wish to transfer them to The Passionists, follow these instructions:

Broker: Charles Schwab and Company, Inc.

Address: Attn: Mutual Funds
101 Montgomery Street
San Francisco, CA 94104

For Deposit To: The Congregation of the Passion, Holy Cross Province

Account Number: 4422-0451

Typically, securities submitted for transfer are delivered within 7 – 10 business days.

Contact us with the following information so we can thank you for your gift!

- Your name.
- Your phone number.
- Name of the securities being gifted.
- Number of securities being gifted.
- Your broker's name and contact information.
- Any restrictions that you are placing on your gift.

Please contact Robin Heart in our Donor Relations Office at rheart@passionist.org or at 800.295.9048, extension 2210. We are so grateful for your gift.

May the Passion of Jesus Christ be Always in our Hearts!